

Introduction

The “Bid Opening & Award & Purchase Order (PO) Creation ” Quick Reference Guide is designed to provide the minimum steps necessary in comparing quotes to submit a reward recommendation for approval and understanding how to properly create a Purchase Order.

Upon opening a bid from the Bid Tabulation, it is recommended that the Buyer review the Vendors Quote Attachments and their response to the Terms and Conditions. Once you verify the quotes have been received and are complete, proceed to begin comparing the Quotes to make an award recommendation.

Pre-requisites

You must have the Basic Purchasing Role.

Steps

Step 1:

a.) From the Home Screen once logged in, select the **Bids Tab**.

Home - Welcome Back Isidra Chavez

News(1) Dashboard Reqs(0) **Bids(199)** PO(0) Approval(0) My Reminders(0) Events(0)

News ID	Effective Date	Category	
3	04/15/2014	Notices	Please Avoid

Step 2:

Once you click the Bids Tab, several sub-tabs will appear below.

a.) Click the **ready to open** sub-tab.

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News(1) Dashboard Reqs(0) **Bids(222)** PO(1) Approval(0) My Reminders(1) Events(0)

In Progress(2) Ready for Approval(0) Ready to Send(1) **Ready to Open(205)** Opened(9) Approved(6)

Step 3:

A list of Bids will display.

a.) Find your bid from the list and click the **open bid** link.

Bid ID	Buyer	Item	Created	Action
AGENCY14B0001885	Administrator System	Kathy's Kayak	09/08/2014 08:19:00 AM	Create new quote
AGENCY14B0001888	Linda Ross	Fun & Games	09/15/2014 10:58:00 AM	Create new quote
AGENCY14B0001891	Isidra Chavez	coffee	09/05/2014 12:05:00 PM	Open Bid

Note: If responses have been received, an “**open bid**” link appears AND if no responses have been made you will see a “**create a quote**” link, which allows the buyer to enter a quote manually from a bid received offline.

Step 4:

Upon clicking the Open Bid link, the **Summary Tab** displays.

- a.) Scroll down to the bottom of the page & click the **Bid Tab**.

Note: You have the option to view the **quote history** button, which displays a complete list of all submitted Quotes.

Open Market Bid AGENCY14B0001891

General Items Address Accounting Routing Attachments(3) Notes Bidders Questions Amendments Q & A Reminders **Summary**

Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved/Canceled	Approved/Disapproved by
There are no pre-bid approval paths found for this bid.					

Bid Tab Cancel Bid Clone Bid View Quote History Print

Step 5:

You will be directed to the **Bid Tabulation** page.

- a.) Click the **Quote # link** and review the Vendors information, including Attachments and their response to the Terms & Conditions..
- b.) Close the Quote window once complete.

Bid Tabulation for Bid #AGENCY14B0001891

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Total Number of Submitted Quotes: 1

Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
00001850	coffee	00049884	IC LLC	09/05/2014 12:01:35 PM	View Quote

Create New Quote

Step 6:

- a.) Click on the **Items Tab**.
You are now able to view and compare quotes to make your Award Recommendation.
- b.) Select your Vendor(s) by marking the check box OR you can also select the **Award All** button.

Note: The award can be to one Vendor or split between multiple Vendors.

Bid Tabulation for Bid #AGENCY14B0001891

Quotes Revision **Items** Header Questions Subcontractors

Cancel	Item info/Quote info	(00049884)IC LLC <Quote: 00001850>
<input type="checkbox"/>	Coffee - whole bean Item #1 Print Sequence:1.0 Status:280 - Opened Quantity:100.0 Uom:LB	<input checked="" type="checkbox"/> \$50,000.00 Discount: 0%
<input type="checkbox"/>	Coffee - ground Item #2 Print Sequence:2.0 Status:280 - Opened Quantity:50.0 Uom:LB	<input type="checkbox"/> \$20,000.00 Discount: 0%
<input type="checkbox"/>	Will be buying coffee in 10lbs increments packaged in 1lb packages. Item #3 Print Sequence:3.0 Status:280 - Opened (Narrative Item)	
Totals: \$Vendor Gross Total:		\$6,000,000.00
\$ Vendor Discount:		\$0.00
\$ Vendor Net Total:		\$6,000,000.00
\$ Preference Discount:		\$0.00
\$ Evaluation Total:		** \$6,000,000.00
\$ Vendor Freight:		\$0.00
\$ Awarded:		\$0.00
Eval Codes:		
Pref Codes:		
Award/Unaward All:		<input type="button" value="Award All"/> <input type="button" value="Unaward All"/>

on Code Descriptions:
lowest Item Price or Lowest Evaluation Quote Total

Step 7:

- a.) Confirm your selection by clicking the **OK** message.

Message from webpage

? This action will award all the items to quote #00001792 and save the changes on other quotes. Are you sure you want to proceed?

Step 8:

- a.) Select the **Header Questions** tab to review responses from Vendors that you may have.

Bid Tabulation for Bid #AGENCY14B0001891

Quotes Revisions Items **Header Questions** Subcontractors Routing Attachments Score Summary

of Quotes per page: 5 Sort by: Quote Total Ascending Go

Question/Answer	00001850 IC LLC
#1: testing today?	Yes

Step 9:

- a.) Go to the **Attachments Tab**. Attach the Agency Award Recommendation Letter with Protest Instructions & Evaluation.
- b.) Click the **Add Attachment** button.

Note: This is a **REQUIRED** step for the SOM.

Bid Tabulation for Bid #AGENCY14B0001891

Quotes Revisions Items Header Questions Subcontractors Routing **Attachments** Score Summary

i Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

i Click Add Attachment to add attachments.

No Attachments

Add Attachment

Step 10:

- a.) Click the **Summary Tab**.
- b.) Click the **Submit for Approval** button.
- c.) Click the **OK** confirmation pop-up message.

Bid Tabulation for Bid #AGENCY14B0001891

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) Score **Summary**

Submit for Approval

Print

Step 11:

The **Approval Path** page displays.

- a.) Click the **Automatic Approval** radio button.

Open Market Bid AGENCY14B0001891

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

☐ Manually add approvers

☒ Automatic approval

Please select an approver if you want to manually add approvers.

Approver

Add Approver

Save & Continue

Cancel & Exit

Step 12:

The **Summary Tab** displays, with a Create PO button at the bottom of the page.

- a.) Click the **Create PO** button at the bottom of the screen.

Bid Tabulation for Bid #AGENCY14B0001840

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) **Summary** Back to Bid

Bid Tabulation Information

Attachments: Award Recommendation Protest Letter

Total Item Count: 2 Total Awarded Quote Count: 1 Bid Status: 2BA - Bid Approved (Ready for Vendor Awarding)

Cancelled	Item info/Quote info	
	Abrasive equipment Item #1 Print Sequence 1.0 Status 2BA - Approved Quantity 1.0 Uom EA	\$2,000.00 Discount: 0%
	Item for test Item #2 Print Sequence 2.0 Status 2BA - Approved Quantity 2.0 Uom EA	\$50,000.00 Discount: 0%
Totals: \$Vendor Gross Total:		\$102,000.00
\$ Vendor Discount:		\$0.00
\$ Vendor Net Total:		\$102,000.00
\$ Preference Discount:		\$0.00
\$ Evaluation Total:		** \$102,000.00
\$ Vendor Freight:		\$0.00
\$ Awarded:		\$102,000.00
Eval Codes:		
Pref Codes:		

Evaluation Code Descriptions:
** = Low Item Price

Create PO Print

Step 13:

The **PO Creation Preview** page displays.

- a.) Click the **Continue** button.

Note: The PO creation options are defaulted with check boxes marked, leave as is.

Bid AGENCY14B0001891 - Purchase Order Creation Preview

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Vendor Name	Total Awarded
00001850	00049884	IC LLC	\$6,000,000.00

Purchase order creation options:

- ☒ Include Narrative Items
- ☒ Include Bid Attachments
- ☒ Include Bid Tab Attachments
- ☒ Include Bid Notes
- ☒ Include Quote Subcontractors
- ☒ Include Vendor Quote Attachments

Click 'Continue' button to create PO or click 'Cancel & Exit' button to cancel the PO creation and return to the bid tabulation summary page.

Continue Cancel & Exit

Step 14:

The PO has now been created

- b.) Click the **OK** button.

Note: Your PO should now be "In Progress" status.

Open Market Bid AGENCY14B0001891 - Purchase Order(s) Created

Status: 2BPO - Bid to PO

The following Purchase Order(s) were created:

PO #	Vendor ID	Vendor Name	Total	Date Created	Status
AGENCY14P00000754	00049884	IC LLC	\$6,000,000.00	10/09/2014	3PI - In Progress

OK

The page refreshes back to the Home Page screen.

Buy4Michigan

Basic Purchasing Inquiry Internal Administrator Organization Administrator

NIGP Code Browse | My Account | Customer Service | Current Organization: Department of Technology Management and Budget | October 9, 2014 10:56:53 AM E

Home Items Documents Vendors Quick Buy Find It

Home - Welcome Back Isidra Chavez

News(1) Dashboard Reqs(0) Bids(221) PO(2) Approval(0) My Reminders(1) Events(0)

News ID	Effective Date	Category	Title
3	04/15/2014	Notices	Please Avoid Using Department of Training (0123) for any purpose.

Step 15:

Follow the steps below if you will be submitting your PO for approval:

a.) Select the **PO** tab.

PO defaults to the **In Progress Sub-tab**.

b.) Click the **PO** link.

Note: It is recommended to not approve your PO until you have issued the PO in ADPICS to the Vendor and your protest period is over.

Home - Welcome Back Isidra Chavez

News(1) Dashboard Reqs(2) Bids(221) PO(5) Approval(0) My Reminders(1) Events(2)

In Progress(1) Ready for Approval(0) Ready to Send(4) Returned(0) Change Order(0)

Purchase Order #	Organization	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total
AGENCY15P00000769	Department of Technology Management and Budget	10/29/2014	Testing 10/29	6412000/52300	Isidra Chavez	IC LLC	\$10,000.00

Step 16:

The page defaults to the **Summary Tab**.

a.) Click the **General Tab**.

b.) Cut/paste the ITRAC# from the Alternate ID field to the ITRAC# field. Enter your PO, DPO, or BPO # from ADPICS into the Alternate ID field.

This allows you to search for this document in Buy4MI using that # if needed for cross-referencing.

General Items Vendor Address Accounting Routing Attachments(3) Notes Change Orders Reminders Summary

Print Dest Detail: If Different Alternate ID:

Control Code: Days ARO: 0

Retainage %: 0.0 Discount %: 0.0

Contact Instructions:

Tax Rate: Actual Cost: \$11,000.00

ITRAC #:

ADPICS CS-138 #:

ADPICS Requisition #:

Date Last Updated: 11/05/2014 01:42:42 PM User last Updated: Isidra Chavez

Save & Continue

Step 17::

Your PO status is still “In Progress”.

- a.) Select the **Summary Tab**.
- b.) Scroll down to the bottom of the page and click the **Submit for Approval** button.
- c.) Click the **OK** pop-up message confirming your submission.

Open Market Purchase Order AGENCY15P00000769 Status: 3PI - In Progress

General Items Vendor Address Accounting Routing Attachments(4) Notes(1) Change Orders Reminders **Summary**

Header Information

Print Sequence # 2.0, Item # 1: Please let me know the the number of units (quantity) you will be providing by adding an attachment on the attach tab OR under the Item Tab - Notes Sub-tab area.

Bid # / Bid Item #: AGENCY15B0001965 / 2

Receipt Method	Qty	Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Frei
This item is narrative								

Submit for Approval Cancel PO Clone PO Print Print Vendor Copy

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Step 18:

The Approval Path displays again.

- a.) Click the **Automatic Approval** radio button.

Open Market Purchase Order AGENCY15P00000769

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

☐ Manually add approvers
☒ Automatic approval

Please select an approver if you want to manually add approvers.

Approver: Add Approver

Save & Continue Cancel & Exit

Step 19:

Your status should now be “In ready to Send”.

- a.) Scroll down to the bottom of the page and click the **Save & Continue** Button.

Note: The Vendor Notification Action section radio button is defaulted to **Send Email & Notify Vendor**. Leave as is.

Open Market Purchase Order AGENCY15P00000769 Status: 3PRS - Ready to Send

General Items Vendor Address Accounting Routing Attachments(4) Notes(1) Change Orders Reminders **Summary**

Vendor Notification Actions

Option(s) ☒ Send Email and Notify Vendor ☐ Set to Printed Status

Save & Continue

Cancel PO Clone PO Print Print Vendor Copy

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Step 20:

The Vendor Notification Result page displays.

- a.) Click the **OK** button.

Vendor Notification Result

Subject: Purchase Order Notification - Testing 10/29

Email Recipients

Delivery Date: 10/29/2014 01:46:30 PM

Vendor ID	Vendor Name	
00049884	IC LLC	Isidra Chavez (ichavez@donotreply.com)

OK

The page refreshes back to the Summary Tab.

Your PO status should now be in **"Sent"** status.

The following highlighted buttons at the bottom of the screen should appear.

Open Market Purchase Order AGENCY15P00000769

Status: 3PS - Sent

General Items Vendor Address Accounting Routing Attachments(4) Notes(1) Change Orders Reminders **Summary**

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved	Approved/Disap
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There are no approval paths found for this Purchase Order.

Cancel PO

Clone PO

Print

Print Vendor Copy

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